

UK–Asia music business collaborations: Liverpool Sound City, Modern Sky and Zandari Festa

Global Media and China

2019, Vol. 4(4) 437–461

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DOI: 10.1177/2059436419883738

journals.sagepub.com/home/gch

Haekyung Um 
University of Liverpool, UK

Abstract

This article explores the dynamics of transnational business collaboration between UK and Asian music companies, focusing on Liverpool Sound City in the United Kingdom, Modern Sky in China and Zandari Festa in South Korea. The specificities of their music business, the nature and motivation for partnership, the respective industry infrastructure and state cultural policies give shape to the outcome of their collaborations, which in turn influence their music products, events, artists and audiences. The complexity of their business transactions and interactions also tell us how the live music sector and its ecologies continue to evolve and reposition themselves in the fast-changing environments of the global music industry. In reflection of an increased transnationalisation and diversification of the global music industries, it is argued that more attention should be given to the transnational and translocal ecologies of live music studies.

Keywords

Asian music industries, Chinese music industry, cultural and creative industries, cultural policy, indie music, live music ecology, soft power, South Korean music industry, transnational business collaboration, UK music industry

Introduction

The year 2019 marks the 50th anniversary of the Woodstock Music Festival, which was held on 15–18 August 1969 in an open field in Bethel, New York, attracting an audience of more than 400,000.¹ Woodstock, arguably as one of the most iconic music festivals of the 20th century, has been celebrated as the milestone in the use of live music as a medium for political and social expression, representing the 1960s counterculture in this case, while also functioning as a

Corresponding author:

Haekyung Um, University of Liverpool, 80-82 Bedford Street South, Liverpool L69 7WW, UK.

Email: h.k.um@liverpool.ac.uk



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springboard for commercial development for rock and pop music events (Bennett, 2004). The Glastonbury Festival, which started in 1970 as another symbol of counterculture of the era, has also grown into an iconic live music event that blends liberal political and cultural messages, and commercialism (Anderton, 2011; Flinn & Frew, 2014).

Live music, place and identity are often inextricably linked to each other, bringing the culture, economy and geography together. For example, live music venues, according to Ballico and Carter (2018), play a vital role in creating localised place-specific music scenes because these music venues facilitate opportunities for the musicians to connect with one another, with music industry and with their audiences. These spaces also contribute to the cultural and creative identities of the communities and cities in which they operate (Ballico & Carter 2018, pp. 203–205). Examples of the place, music scene and identity connection include Liverpool and British rock (Cohen, 1991, 2012) Austin and US rock 'n' roll (Shank, 1994), Nashville and country music (Lange, 2004; Pecknold, 2007), Beijing and the Chinese rock scene (de Kloet, 2005; Huang, 2001), to name a few.

Generally speaking, the term live music is used to distinguish musical performance from recorded material, video or studio recording. The concept of live music is not new and, in fact, all musical performances were categorically live until the invention of recording technology and mass media broadcasting. The term 'live music' began to be used in the 1930s as an alternative to recorded material in radio broadcasts (Holt, 2010, p. 244). Over the coming years, the word 'live' gained different and broader meanings, for example, a generic term for a performance that is not pre-produced in a studio and mediated via a playback device while still technologically mediated in, for example, 'live shows', 'live interviews', 'live audience' and 'live interaction' (Holt, 2010, p. 245). In the 1940s, when musicians' unions reacted against the use of recordings on the radio and jukeboxes in bars, live music discourse was developed to define live performance as an authentic practice and creative musicianship, in contrast to recordings as a 'dead object'. This dichotomy of live and recorded is also based on the notion that, in the age of mechanical production of recording, live music possesses what Walter Benjamin (1935/2011) defined as the 'aura', or unique aesthetic authority. This hegemony of live over recorded was later diminished, Holt (2010) suggests, with the emergence of the discotheque in the 1960s and MTV in the 1980s. In this context, the concept of live music is best to be understood as 'a product of broad and social cultural transformation in modernity' that was also 'born in the nexus of commerce, media and entertainment' (Holt, 2010, pp. 244–245). Live music, Holt (2010) maintains, is 'a cultural and aesthetic category which informs musical life on many levels' (pp. 244–245). Moreover, live music is associated with 'the culturally and commercially valued performance in a desired time and space' highlighting its social and economic values and contextual specificities (Holt, 2010, p. 245).

The importance of live music, in the culture industry sector, has not been diminished (Frith, 2007) but continued to grow after digital music sales overtook physical music sales globally in 2015 (e.g. van der Hoeven & Hitter, 2019). The growth of the live music industry is estimated, according to a new study from Pricewaterhouse Coopers (PwC), to reach US\$31 billion by 2022 (Sanchez, 2018).² This commercial potential has been advanced by two US-based music conglomerates, Live Nation Entertainment³ and the Anschutz Entertainment Group (AEG),⁴ as the key players in the live music sector which, in turn, is becoming a transnational and global business. In this context, Asia is now emerging as the fastest growing music market, with Japan, South Korea and China in the top 10 biggest music markets in the world (International Federation of the Phonographic Industry, 2019a).

Research context and methods

In the past two decades, the category of live music emerged as an important topic for academic enquiry in music studies. Auslander's (1999/2008) work on the nature of liveness and Frith's seminal discussion on the social and economic significance of live music (Frith, 2007) laid the foundation for these live music studies, which are concerned with the key issues and topics of the economics of live music (e.g. Holt, 2010, see below for more discussion), policy implications (e.g. Cloonan, 2011, see below), sponsorship (e.g. Anderton, 2011) and cultural value and cultural policy (e.g. Behr, Brennan, & Cloonan, 2016).

Holt (2010) analyses and discusses how live music has given shape to a new economy in the digital age. According to him, there are four key economic aspects in live music as follows:

1. Live music has become a major domain and structuring force in the economy of music.
2. There is a categorical price change in live music with a considerable increase in both the ticket price and the attendance frequency.
3. New and renewed event genres have been developed to attract contemporary audiences. For example, rock festivals take a more holistic approach to the festival experiences by investing on the amenities and facilities and also offering a variety of non-music entertainments, including the new genre of theatre-style shows.
4. While all forms of live performances are bound to the physical space and performance which are highly immobile and spatially and temporally specific, the live experience is shaped by multimedia practices. In this sense, media and performance are complementary, converge and cross-fertilise (Holt, 2010, pp. 248–255).

Cloonan's discussion of live music and policy in the United Kingdom offers an illuminating examination on the complexity of the economic, social and cultural impacts of live music in the United Kingdom. He argues that while the United Kingdom's live music is of greater economic value than recorded music, it is largely under-researched especially in terms of policy – this point, perhaps, applies to the live music studies in general. His examination of live music policy in the United Kingdom focuses on three issues including 'regulation', 'the black economy and sharp business practice' and 'development in concert ticketing' (Cloonan, 2011). Regarding regulation, he identifies two key areas: the local regulation of the way live music events are advertised and the way in which national licensing legislation is implemented locally. Importantly, he emphasises the close relationship between the arts/cultural policy and business policy. Regarding the Black economy and sharp business practice, he suggests that live music is simultaneously one of the most and least regulated part of the music industry, partly because it is part of the 'Night Time Economy (NTE)' (Cloonan, 2011, p. 410). With respect to the impact of technology on ticketing, he suggests, the Internet has transformed concert ticketing with round-the-clock availability of tickets becoming an important part of the economy of the music industry. In addition, the rise of secondary ticketing created a complex situation in which the UK government was asked to choose between different concepts of property (ticket ownership). Finally, Cloonan argues that at the time when the live music economy succeeded recorded music, the authentication of the live music experience, *as an experience* of popular music, is also perceived to be more valuable than listening to recordings. In this context, he argues, 'live music can be seen as being in the ascendant economically, culturally and ideologically' (Cloonan, 2011, p. 417). In this way, Cloonan posits, live music needs to be understood in connection with both cultural policy and business policy.

Behr, Brennan, Cloonan, Frith, and Webster (Behr et al., 2016) propose an ecological approach by ‘putting *place* at the centre of the economic and cultural networks’. They posit that this approach is ‘a kind of shorthand to make sense of the relationships amongst the various factors and actors involved’ (Behr et al., 2016, p. 5). According to them, the ecological approach is compared with other spatial metaphors such as ‘milieu social’ (Durkheim, 2008), ‘art world’ (Becker, 1982), ‘cultural field’ (Bourdieu, 1993), ‘pathway’ (Finnegan, 1989) and ‘scene’ (Straw, 1991), as well as several related concepts, such as ‘quarters’ and ‘clusters’, which are commonly used in the creative industries. The key term to consider here, they suggest, is ‘environment’ because listening to live music is spatially and temporally specific, and this factor is also central to both the economic problems of live music promoters, and the cultural values of concerts for performers and their audiences. Above all, they suggest, the ecological approach helps to understand how the materiality of musical place (i.e. its size, shape, acoustic and physical accessibility) affects the social construction of musical meaning. This ecological approach differs from the above-mentioned various spatial metaphors, which tend to focus on the social relationships in music and the dynamics of creativity while neglecting the material and physical aspects of music-making (Behr et al., 2016, p. 6). An ecological study of live music, they argue, also means studying social agents which are not in any coherent ideological way members of the social networks described by Becker’s art world, Bourdieu’s cultural fields or Finnegan’s pathways (Behr et al., 2016).

Many studies of live music discuss the social and cultural values of live music as well as its economic values. However, while it may be easier to quantify the economic values of live music, in connection with cultural policy and business policy, it is not always easy to measure the cultural and social values of live music, partly due to the fact that the concept of cultural values raises questions of definition (Angelini & Casteliani, 2017 cited in van der Hoeven & Hitter, 2019, p. 264). According to Throsby (2001, cited in van der Hoeven & Hitter, 2019, p. 264), the concept of cultural values covers several constituent elements, such as aesthetic value, spiritual value and historical value, as well as social value. However, Klammer understands social value as a separate category, including a sense of belonging, identity and social distinction (Klammer, 2004, p. 150, cited in van der Hoeven & Hitter, 2019, p. 264). The tripartite distinction between cultural, social and economic value may be helpful for our understanding of various values of live music. In addition, other related definitions that also raise relevant questions are cultural or intrinsic values versus instrumental values, which Behr, Brennan, and Cloonan (2016, p. 403) deem to be different when they are associated with arts policies. The intrinsic values, according to McCarthy et al., refer to ‘effects inherent in the arts experience that add value to people’s lives’ (McCarthy et al., 2004, p. 37, cited in van der Hoeven & Hitter, 2019, p. 264), such as joy, pleasure, emotional stimulation and meaning. These intrinsic cultural values are essential when culture is used (i.e. instrumental value) to achieve particular social and economic goals (van der Hoeven & Hitters, 2019).

Many of the live music studies also focus on a specific locality or city, for example, live music policy in Melbourne (Homan, 2010; Martin, 2017) and rock clubs in New York City (Holt, 2013), because place is seen as the centre of the economic and cultural networks, from an ecological point of view (Behr et al., 2016). Similarly, examples from the British live music and music festival studies include a survey on British pop festivals and tourism (Stone, 2007), UK music festival sponsorship (Anderton, 2011), managing the mystification of festivity of Glastonbury (Flinn & Frew, 2013), a comparative study of visitor motivations for attending the Glastonbury and V Festival (Gelder & Robinson, 2009), to name a few. Another feature of the live music researches is closely related to urban planning and urban policies so that a substantial number of publications on live

music are music reports and strategies commissioned by national and public organisations, for example, from Australia, the United States, South Africa, Canada, Ireland, the United Kingdom and the Netherlands (see van der Hoeven & Hitter, 2019) and South Korea (e.g. a report on music festivals in Korean by Shin & Lee, 2013).

While many live music studies focus on the Anglo-American cases, there are some studies of music festivals in Asia published in English which examine, for example, festival goers' motivation to attend the Midi Festival in China (Li & Wood, 2016), policy implications of the Strawberry Music Festival (Groenewegen-Lau, 2014) and the host perceptions of the leisure and tourism impact of the Beijing Strawberry Festival (Han, Wang, Zheng, & Zhang, 2017).

Given the complex nature of live music including economic values, social and cultural values, national and local policy and the fast-changing ecologies of the live music sector in recent times, it is helpful to consider what Holt proposed as 'new research strategies' for live music studies because, according to Holt, 'we cannot understand how, why and with whom music is produced and valued if we do not examine musical practices in the context of broader social and technological change'. For this, he argues, future research requires interdisciplinary teamwork between media and performance studies, with cultural studies serving as a common ground (Holt, 2010, p. 256). By way of taking 'the idea of the concert as media experience' and also in order to capture the 'presence in the here and now', ethnographically derived knowledge among audiences and producers is necessary for grounding theorisations of media and performance (Holt, 2010, p. 256).

With all these points in mind, I will take an ethnographic approach to the study of British-Asian transnational collaborations, which offer an interesting and timely vantage point from which to understand the current position and future development of this live music sector, especially for indie music, both locally and globally. To do this, this article is built on a 2018 pilot study of transnational music business collaborations between Liverpool Sound City in the United Kingdom and its Asian partners, Modern Sky of China and Zandari Festa of South Korea.⁵ The focus of this project was placed on three live music events, including the Sound of the Xity Festival, Beijing in April, Liverpool Sound City Festival, Liverpool in May and Zandari Festa, Seoul in September 2018. This project attempts to capture the 'spatially and temporally specific' nature of the environment of the live music-making in these three music festivals by taking what Behr et al. (2016) termed an ecological approach. I also would like to call the current project a 'pilot study' because it began as a 'scoping mission' to explore three music festivals held in three different territories in the same year, with a view to identifying both the common and specific issues and to develop a more comprehensive and 'interdisciplinary' research project (Holt, 2010) on the topic of transnational live music collaborations in the future, which hopefully involves a team of researchers from the United Kingdom, China and South Korea.

In an effort to gain ethnographically derived knowledge among audiences and producers (Holt, 2010), I attended live music events at the three locations in the United Kingdom, China and South Korea, to observe the musicians, audiences and their interactions during their 'on-site musical performance'. I also attended various music industry conferences and workshops organised by Liverpool Sound City and Zandari Festa as well as interviews with the artists, promoters and audience members in the United Kingdom, China and South Korea. I was also able to interview a consultant and music sector specialist for the Creative Consumer and Sports Directorate at the Department for International Trade, which is responsible for UK creative industry development and its overseas promotion. However, it should be noted that in-depth ethnographic research on all

the three festivals in equal measure was not possible due to the time constraints and lack of resources for this pilot study.

In addition, during this pilot study, a short documentary film, entitled *Three Sound Cities: Liverpool, Beijing and Seoul*, was made and had its first screening at the 2019 Liverpool Sound City Conference in May 2019. The audience discussions and questionnaires at various screening of the documentary film, in China, United Kingdom and South Korea are being planned as an additional research method to explore the translocal audience receptions.

By focusing on these three case studies, this article explores the dynamics of transnational business collaborations between the United Kingdom, Chinese and South Korean music companies and their strategic adaptations in their fast-changing business environments and political contexts. The key questions to address include the following:

1. What are the cultural, social and economic values of the transnational live music collaboration between the Liverpool Sound City, Sound of the Xity and Zandari Festa? Are they shared by the three music festivals? Or are they specific to each festival?
2. If we were to take an ecological approach, as proposed by Behr et al. (2016), by 'putting place as the centre of the economic and cultural networks' to understand 'the relationships amongst the various factors and actors involved', how, if at all, does this ecological approach help us to understand live music in transnational and translocal contexts as exemplified by the three music festivals under examination?
3. In what ways do music venues and the materiality of musical place give shape to the social construction of musical meaning for these three music festivals? Conversely, how are these social constructions of musical meanings created and shared by various actors and stakeholders, including, artists, promoters, agents, labels, venue managers, audiences, critics, policy makers and so on?
4. How do these international collaborations contribute to the creation of a space, or a localised place-specific music scene in each festival locality? And in what way do these contribute to the cultural and creative identities of the communities of the producers and consumers of live music?
5. And finally, in what way does the digital technology and social media give shape to the development of transnational live music collaborations?

This article consists of the following sections. It starts with an overview of the music industry context in the United Kingdom, China and South Korea with a focus on the recorded music and live music sector in each territory. The main body of the article consists of the three interrelated case studies: The UK case study focuses on the Liverpool based company, Liverpool Sound City, which has been playing a critical role as a key mediator of the UK–Asian collaboration examined in this study. The Chinese case study is concerned with Modern Sky, a Beijing-based music entertainment conglomerate, which has been a key player in the Chinese music business since 1996, while the case study of South Korea focuses on Zandari Festa, the largest showcase festival in South Korea. The discussion section offers a comparison of the three case studies in an attempt to illustrate the complexity and dynamics of the ecology of live music in a transnational milieu involving the UK and Asian companies as well as the broader context of the global music markets. Finally, the conclusion will critically examine the findings from the theoretical and methodological points of view and discuss the area for further research.

Music industry overview: United Kingdom, China and South Korea

The 2019 Global Music Report by the International Federation of the Phonographic Industry (IFPI) ranked the United Kingdom as the third largest recorded music market in the world in 2018, with a total revenue of US\$1399.7 million, following the United States first with US\$6644.1 million and Japan second with US\$2865.9 million. While South Korea remained in the 6th place (US\$599.9 million) since 2017, China rose rapidly to the 7th place in 2018 (US\$531.3 million) with a staggering 79.6% growth, from the 10th place in 2017 and the 12th place in 2016. These records are only based on the revenue of recorded music with a further breakdown into the categories of digital, physical, performance rights and synchronisation. However, they still reflect the dynamics of the global music market and the nature of the changes that have taken place in recent years. For example, China's rise in the global music market owes much to the rapid growth of digital sales at 96% (90% streaming and 6% other digital). While performance rights and synchronisation make up 4% of the market share, the physical music sales in China came to only 1%. On the other hand, the United Kingdom is a mature music market with a 3.1% growth from the previous year. It is broken down to 57% digital (49% streaming and 8% other digital), 23% physical, and 20% performance rights and synchronisation. South Korea's recorded music market yet again has a very different profile: 57% digital (55% streaming and 2% other digital), 40% physical, and 3% performance and synchronisation. The high market share of physical music could be attributed to the sale of K-pop worldwide. South Korea had a high growth of 17.9% in 2018, although its growth slowed down from a 45.8% increase in the previous year (International Federation of Phonographic Industry, 2019a).

Since the digital music sales overtook the physical music sales in 2015 globally, the ownership of music became less significant to many audiences and consumers of music. Instead, the audience experience and response may be more important and live music offers the music consumers an opportunity to take part in music as social engagement and experience its 'liveliness'. In this context, the recent growth in the economic and cultural value of the live music sector is reflected in the growth of music festivals and world tours of international artists around the globe. The economic and social value of the live music sector has always been significant, but in the era of digitisation increasingly significant.

For example, the whole music sector's contribution to the UK economy in 2017 was £4.5 billion (with 2% increase from the previous year). The live music sector generated £991 million, which is 22% of the total music revenue (UK Music, 2018). In addition, the 2017 UK Live Music Census, undertaken in March 2017 in three UK cities, including Glasgow, Oxford and Newcastle Gateshead, reported people spending more money on tickets for concerts and festivals than recorded music. It is also notable that on average nearly half (49%) of the annual income, of those respondents to the survey identified as professional musicians, came from performing live, compared to 3% from recording (Webster, Behr, Cloonan, & Ansell, 2018).

According to the 2017 South Korean Music Industry White Paper, the total revenue from music in South Korea in 2016 was ₩5,308,240 million (with a 7% increase from the previous year) or £3.6 billion (US\$4.49 billion). The income from the live music sector was ₩3,791,618 million, which is £2.57 billion (US\$3.2 billion). The live music sector in South Korea, which includes live performing arts and related service providers' productions, makes up 71.4% of the total music market share (Korean Ministry of Culture, Sports and Tourism, 2018). In addition, the business of music festivals in South Korea boomed since the early 2000s and its impact on the live music sector and the music industry has been significant (Shin & Lee, 2013).

According to the 2016 China Music Industry Report, the total music revenue in 2015 was 2.72 trillion yuan, which is US\$39.5 billion (£31.6 billion). The live music sector in China is worth 15 billion yuan, which is only US\$2.18 billion (£1.74 billion) and it covers concerts (65.25%), musicals (25.72 %), music festivals (7.64%) and live house (1.39%) (Wang & Zhao, 2017). Large-scale open space music festivals in particular emerged in the late 2000s as a new form of entertainment in the developing sector of Chinese cultural and creative industries (Groenewegen-Lau, 2014; Steen, 2000), but in comparison with the United Kingdom and South Korea, the live music sector remains underdeveloped.

In the context of these music business environments, the next three interrelated sections will discuss the transnational business partnership in the United Kingdom, China and South Korea, focusing on Liverpool Sound City, Modern Sky and Zandari Festa in the respective territory. The business development of these companies and their various collaborative projects including programmes of showcase are described as below.

UK case study

Liverpool Sound City

Liverpool Sound City (Sound City hereafter) is a live music promoter and festival established in 2007 by Dave Pichilingi and presently managed by Becky Ayres. They have been organising the annual music festival and music industry conference since 2008. The specific location of the Sound City Music Festival has moved while maintaining its connection within the city's boundaries. From 2008 to 2014 the music festival was held in the city centre venues such as The Zanzibar, The Kazimier, Liverpool Anglican Cathedral, Heebie Jeebiess, The Cavern Club, Leaf Café and so on. In 2015, it was relocated to Liverpool's historic dockland in Bramley-Moore Dock (for 2015–2016) and Clarence Dock (for 2017). The open space of the docks allowed for a bigger audience capacity with multiple medium and large-scale outdoor stages and several tented performance spaces on the site. Since 2018 the festival has been moved to the Baltic Triangle,⁶ another historic industrial area with former warehouses, transformed into a 'creative district' of Liverpool as part of the urban regeneration that has been taking place in the past 10 years. The space in the Baltic Triangle allows for a mixture of indoor venues and outdoor stages for the music festival. In this way, the Sound City Music Festival has maintained its connection to the urban space of the city and its transformations. The recent regeneration of the Liverpool's historic and heritage sites offers a new space for creative industries in Liverpool (Cohen, 2007). The Liverpool Music Sound city's live music-making in this space symbolically reaffirms its connection to the city's heritage as one of the main British ports and a gateway to the world. Venues in the Baltic Triangle greatly benefit from the annual Liverpool Sound City Festival, which helps to brand and promote the Baltic Triangle as a creative and musical space nationally and internationally.

In addition to their annual festivals and conferences, Sound City has also organised a number of international music industry events which focus on the development of the Asian music markets for the British companies and artists. For example, a 1-day event 'Gateway to the Asian Music Markets' was held on 28 June during the 2016 International Business Festival in Liverpool. Sound City and Dave Pichilingi were instrumental to the organisation of this event in partnership with UK Trade and Investment,⁷ The Cultural Diary⁸ and Modern Sky (a key player in the Chinese music sector and became Sound City's business partner).⁹ Industry specialists and practitioners from the United Kingdom, India, Japan, China, Taiwan and South Korea gave presentations and

led the region-specific round tables. Shen Lihui, CEO of Modern Sky Entertainment and Stan Yu, Director of TMT Entertainment represented China, while Kong Yoon Young, CEO of Zandari Festa and Kyu Young Lee, CEO of Ruby Records and Pentaport Festival attended the event as invited speakers.

In the following year, Sound City organised another music industry event during the 2017 Liverpool Sound City+ conference in partnership with the British Council. A session entitled 'Welcome to Asia: Time to Collaborate is Now', on 26 May 2017, hosted overseas music promoters, festival directors and journalists from across Asia including China, South Korea and Indonesia, to share ideas and discuss the opportunities for future collaboration.

Another major music industry event which Sound City coordinated is the 1-day event 'Discovering Real Business Opportunities in the Asian Markets' on 26 June during the 2018 International Business Festival in Liverpool. This full-day programme of workshops and networking sessions were built on the 'Gateway to the Asian Music Markets' event which Sound City delivered 2 years earlier. According to the 2018 programme note, the 2016 event generated £8 million on contracts signed for by companies taking part (Department of International Trade statistics). Building on this achievement made in 2016, the 2018 event was designed to help the participants to develop their export potential and gain new contacts and deals, specifically targeting Japanese, Chinese, Korean and Indian music industry experts as well as the UK music industry.¹⁰ Sound City also became one of the Arts Council England's National Portfolio Organisations (NPO) in 2018 in the 'combined arts category' of the NPO programme. This appointment, which will provide them with funding from the National Lottery for 4 years, is also a significant sign of the recognition of their role and contribution as a live music promoter and festival organiser operating both nationally and internationally.

Sound City's Korean partnerships began in 2013 when Zandari Festa sent Korean acts to the Liverpool Sound City Festival with support from the Korean Creative Contents Agency (KOCCA) and a South Korean firm Hyundai Credit Card. In return, Sound City has been organising a showcase programme called 'Sound City Korea' to take UK artists to Seoul for Zandari Festa and MU:CON (Seoul International Music Fair).¹¹ Applications for the 2019 Sound City Korea were open. It should be noted that the Sound City Korea showcase project was initiated under the 'International Showcase Scheme', funded for 4 years by Arts Council England and the British Council. For both Sound City and Zandari Festa, public funding has been instrumental for their partnership and ongoing showcase projects. For example, the Department of International Trade (DIT), Arts Council England and the British Council provide funding for various music industry events and overseas tours to export British talents and business while the Korean Creative Contents Agency (KOCCA), Korea Arts Management Service (KAMS) and Arts Council Korea (ARKO) have been supporting Korean artists for their international tours. It should be noted that the Korean public funding, in turn, is supported by the state cultural policy. The South Korean Ministry of Culture, Sports and Tourism announced the globalisation strategies for Korean Culture Industries in June 2011 with five main objectives as follows: (1) Promotion of K-pop as the main Hallyu (Korean Wave) proponent; (2) Establishment of an infrastructure for sustained development of Hallyu; (3) Development of business environments for the global market; (4) Development of overseas exchanges in the target regions; and (5) Development of policies to support culture industries (see Kwon & Kim, 2013).

Clearly, cultural policymakers and funders of the United Kingdom and South Korean both take what Cloonan (1999) termed a 'promotional' approach towards the export of their cultural and creative industries. The Sound City Korea project to showcase the British talents in Korea proved

to be successful: it is reported that the deals for artists and industry attending the 2016 Sound City Korea events were worth US\$50,000 and they also predict that US\$146,000 will be spent on artists performing at the showcase over the long term.

The business partnership between Sound City and Modern Sky that began in 2016 continued to grow over the years. Dave Pichilingi regards it to be both a strategic partnership and a friendship between the two. Shen Lihui stressed that this international partnership, between Sound City and Modern Sky, is not for the sake of short-term profit but inspiration for the long-term development.¹² In 2016 Dave Pichilingi, the founder of Sound City, became the head of Modern Sky UK, which focused on records and publishing. Modern Sky UK also aims to bring British artists to China. He also took another appointment in 2019 as the Head of the New York-based Modern Sky, USA, which was established in 2006. So he is now in charge of running both the Anglo-American wings of Modern Sky.

Becky Ayres, who has been working with Pichilingi since 2007 as the Chief Operating Officer (COO) of Sound City, was appointed as the Managing Director of the company in 2018. Recently Jo Wright, who is a music business consultant, joined Sound City as the Chair of Sound City and overlooks the running and development of the organisation including R&D projects in collaboration with external partners. These various developments and restructuring of the Sound City management show a transformation and internationalisation of an SME (small and medium enterprise) music company, based in northwest England; it is adapting to the fast-changing ecology of the international music industries.

2018 Liverpool Sound City Festival and the Korean stage showcase

The Zandari Festa showcase became an annual event in the Liverpool Sound City Festival since it started in 2013. The acts featured in the 2018 programme of Korean showcase included Gonne Choi (solo female singer song writer), Billy Carter (mixed rock trio), Dead Buttons (rock trio), National Pigeon Unity (rock duo), and Danny Boy and the Carriages (country and folk quartet). Some of these South Korean indie bands have previously performed in international music festivals including Liverpool Sound City, Glastonbury and Great Escape in the United Kingdom and Primavera Sound in Spain. For example, Dead Buttons performed thrice in Liverpool to date and also signed with Liverpool-based Baltic Records. Most of the bands were going to continue to other music festivals in the United Kingdom and or a tour within the United Kingdom and Europe: Billy Carter and Gonne Choi were billed for the K-Music Showcase at the Korean Culture Centre in London after they attended the Great Escape Festival in Brighton along with National Pigeon Unity. Billy Carter also had a tour planned in Ireland.

One Chinese band Zhaoze performed at the 2018 Liverpool Sound City. This post-rock band from Guangzhou, led by the electric seven-stringed guqin zither player H.Z., presented a blend of wide-ranging styles including progress rock, ambient, folk, classical and electronic. But this band came independently on their own initiative without any connection with Sound City's Chinese partner Modern Sky. When Fangzhou Mu, a CCTV radio DJ and presenter from Beijing, asked why the band came to the Liverpool Sound City Festival, H.Z. of Zhaoze replied that it is because of Liverpool and its music heritage, declaring 'All the rock bands admire the Beatles'. This iconic image of Liverpool as a place of rock heritage and the Beatles (Cohen, Knifton, Leonard, & Roberts, 2015) is also shared by another Asian artist who performed at the 2018 Liverpool Sound City. Korean singer Daniel Kim of Danny Boy and the Carriages exuded his excitement: 'I can't believe that I am in Liverpool – the city of the Beatles!' (Interviews with Zhaoze and Danny Boy

and the Carriages, 5 May 2018). While sharing this view, Dave Pichilingi as a promoter takes a broader view: it is its future as a hub of new music and creative industry that is as important as the city's musical legacy and heritage (Dave Pichilingi, personal communication, August 2018).

China case study

Modern Sky

Modern Sky, which is now known as Modern Sky Entertainment, was founded in 1996 by Shen Lihui in Beijing. Shen launched Modern Sky as a record label which primarily focused on Chinese rock. According to de Kloet, the business of Modern Sky benefitted from the increased liberties in the Chinese media market at that time (Zhao, 2008, cited in de Kloet, 2010, p. 16). Modern Sky's prolific output, with at least 10 new titles a year, also played a pivotal role in the rebirth of Chinese rock culture in the late 1990s (de Kloet, 2010, p. 178). According to Steen, the success of Modern Sky was not limited to it as just being an innovative company which released contemporary Chinese rock music appealing to young Chinese urbanites. The company also published a widely distributed monthly music magazine *Modern Sky Sound Magazine*, which was attractively 'packaged' including a 48-page large format magazine, a supplementary pamphlet and a compilation CD or tape. In addition, Modern Sky also operated one of the most popular live music venues, the No. 17 Bar in Sanlitun (Steen, 2000).

Modern Sky has grown into a multifaceted entertainment company covering records, publishing, live music and management. In addition to being the largest independent record label in China, it also became the key player in China's live music sector, especially music festivals. It started with the Modern Sky Music Festival in 2007, and a few years later under the banner of Strawberry Festival, it became the most famous Chinese brand of music festival catering for millions of people. For example, in 2015 the Strawberry Festivals were held in 20 cities across China including Beijing, Shanghai, Xi'an, Zhejiang, Chengdu and Shenzhen.¹³

Along with the indoor 'live house' music in bars, clubs and halls, large-scale open-air music festivals emerged as a new popular form of entertainment. Throughout the 2010s, a number of music festivals mushroomed across China, many of which were held in scenic locations. The rapid growth of the open-air music festival also owes much to the support they got from the local regional governments which saw the festivals as an effective 'city branding' strategy and a source of financial gain through tourism. China's 10th Five-Year Plan (2001–2005), announced in 2000, referred to the culture and creative industries for the first time in the central policy documents. The significance of the cultural industry in China's policy continued to grow with the 12th Five-Year Plan (2011–2015), officially endorsing the culture industry with 'pillar' industry status (Hong, 2011) while the 13th Five-Year Plan (2016–2020) offered more detailed plans for their development.¹⁴ These developments echo the Chinese leadership's plans to transform the country's economy base from manufacturing ('made in China'), to creating ('created in China') (Keane, 2006).¹⁵ Cultural and creative industries in China are not just for commercial gains but are also part of their ideological project that promotes nationalist pride at home (Keane, 2006) and 'soft power' abroad (Garner, 2015; Hartig, 2016), as exemplified by Chinese blockbuster films such as *Hero* (dir. Zhang Yimou, 2002), *Confucius* (dir. Hu Mei, 2010) and *Wolf Warriors* films (dir. Wu Jing, 2015, 2017). At the same time, China's outbound trade can be seen as being 'official' and propagandist as these products often align with the government's brand image, echoing Xi Jinping's declaration in 2013 that 'increasing national cultural soft power is related to the realisation of the Chinese Dream'¹⁶ (Keane, 2016, p. 27).

In this broad context of the central government's cultural policy and the local regional government's support, music festivals also became an important source of income for the artists and for music companies.¹⁷ However, the rapid proliferation of music festivals has also had mixed outcomes. For example, Yu Peiying of *The National Business Daily of China* reports that 269 music festivals were held in 2017 in China, with an increase of 33.8% from the previous year. The overall ticket sales from all of these music festivals reached 580 million yuan (US\$84 million) in that year, representing a 20% growth. However, around 80% of these festivals are reported to suffer huge deficits, regardless of a significant increase in the number of festivals and ticket sales. For example, a 60 million yuan (US\$9 million) investment into the Big Love Chengdu Music Festival achieved a very poor return in box office sales at only 3 million yuan (US\$0.4 million). Shen Lihui, CEO of Modern Sky Entertainment, attributed these problems to the underdeveloped music festival market of China, which also suffers from a lack of investment in the infrastructure, human resources, skills, transportation and so on. Shen concluded that the low ticket price, usually priced at 150–400 yuan (US\$22–73) and the restrictive regulation on the audience number, which does not allow more than 100,000 people to attend makes it very difficult for the business to grow (Yu, 2019).¹⁸

Zhang Ran, the founder of the Sound of the Xity Festival and director of international business for Modern Sky, described festivals across all genres in China developing so 'rapidly and widely that it took a few years to calm down'. The market for live music, according to him, is particularly good in China at the moment. As the publishing and collection of royalties in China is more challenging, musicians strive to play live and the standard of their playing has likewise greatly improved (Zhang Ran, personal communication April 2018).

Modern Sky's internationalisation project continues to grow from Modern Sky USA (2006) and Modern Sky UK (2016), with several new developments in 2018. First, Modern Sky DE was launched in Berlin, Germany. This new European wing of Modern Sky, which aims to develop the arts, entertainment, music and alternative culture in general, clearly reflects Shen Lihui's background and interest in visual arts. Second, a world music label Pollux, with a specific focus on traditional Chinese music, was launched in April, in collaboration with the Guangzhou-based Starsing Music. Its launch ceremony was held at the opening concert of the 2018 Sound of the Xity, with a joint performance by a Tuvan folk singer Sainkho Namchylak from Russia, a Japanese reggae musician Papa U-Gee and Mabang, a Chinese band from the Yunnan and Guizhou provinces. Shen Lihui said in his interview with *China Daily* that 'World music is regarded as a new direction on the international music scene, and we are keen on expanding our music map' (Chen, 2018).¹⁹ In December 2018, the Modern Sky International Artist Booking Agency (MIBA) was launched. It is headed by Zhang Ran, who is Modern Sky's director of international business. MIBA's artist roster is very extensive and international including artists from the Americas, Europe, Asia and Australia. It is also interesting to note Shen Lihui's perspective on his business expansion. Shen said that he does not see Modern Sky just as a Chinese company – they are also a US-based company, a UK-based company as well as a German-based company. He also suggests that at a time like this, perhaps where to be based is not particularly important, emphasising the increasing trans-local nature of his business enterprise (Shen Lihui, personal communication, April 2018).

Arguably, Modern Sky Entertainment represents the whole popular spectrum of the Chinese music industry. Equally, Sound City's partnership with Modern Sky Entertainment covers wide-ranging areas of the music business. It also bridges and mediates the various interests of the two different music business environments and practices of the United Kingdom and China. For example, Dave Pichilingi was instrumental in organising the 'Music Mission to China', which was held in April 2018 during the same period as Sound of the Xity in Beijing. Supported by the Department

for International Trade (DIT), the British Phonographic Industry (BPI) and Association of Independent Music (AIM), this week-long mission was designed to explore opportunities and to grow UK music's presence in China. It included a programme of education, networking, B2B meetings, conferences, showcases, music company site visits and the Sound of the Xity Festival and expo, many of which were organised in collaboration with Modern Sky. Conversely, the new Modern Sky Studio complex in Beijing, opened in 2018, equipped with the latest high-end specification facilities, is partnered with the British music producing company, Stephen Budd Music, to offer Chinese artists an opportunity to work with international producers.

2018 Sound of the Xity and the British showcase

The 2018 Sound of the Xity Festival, held on 11–14 April in Beijing, featured two British acts, the Slow Readers Club (a rock quartet from Manchester) and Yuck (a rock quartet from London). The Slow Readers Club, signed with Modern Sky UK in 2017, were new to China and they performed in Beijing and Hangzhou on this trip. After the Beijing concert, Yuck toured in several first and second tier cities in China, including Shanghai, Hangzhou, Guangzhou and Kunming as well as Taipei in Taiwan, covering six cities in 9 days. Having performed in Asia before, Yuck had a well-established industry network and a fanbase in the region. Yuck is now also on the roster of the Modern Sky International Artist Booking Agency.

The Sound of the Xity Festival had a full programme of music shows in various venues in Beijing, such as Omni Space for the opening night, Yigong Yishan, DDC and School Bar in addition to Flamengo, where the UK bands Yuck and Slow Readers Club performed. These venues were dispersed across the northeastern part of Beijing. So the sense of place as a music festival was very different from that of the Liverpool Sound City Festival and Zandari Festa, both of which were more confined and easily mappable.

Most of the programmes for the 13 and 14 April, scheduled to be held in Yigong Yishan, DDC, School Bar and Flamengo, were all cancelled except for Yuck's concert in Flamengo, with very short notice. The festival organisers had to relocate some of the Chinese bands to an alternative venue, a recording studio in the city, to showcase these bands to a small number of invited international delegates. Cancellation of the music events and the subsequent last-minute schedule change with an abridged programme had happened to these festival organisers before and also to other event organisers in the country. Modern Sky Lab in Beijing had a closure in 2016. The precarious nature of this music business environment and associated difficulties in the Chinese live music sector are attributed to the stringent rules and regulations applied to the event venues and festivals which can attract a large number of audience.²⁰

Zuo Ye, the founder and CEO of Omni Space, told me about many challenges for the live music sector in China, including the market competition, lack of experience, poor investment as well as complex regulations that can stifle small-to-medium businesses. At the same time, he is very optimistic about the future of live music in China and told me that demands for live music remain high in the first and second tier cities where most of the music venues are established. According to him, the increased influx of international artists performing in China helped the local Chinese audiences to be exposed to different music genres and style such as Black music (Zuo Ye, personal communication, April 2018).

So far, Sound City's British showcase to China has been rather small compared with their engagement with Zandari Festa in South Korea. So there is a great deal of potential growth for the 'Sound City China'. Conversely, so far, there has not been any Chinese showcase from Sound of

the Xity or Modern Sky, sent to the United Kingdom, except for a Chinese hip-hop concert in November 2017 in the O2 Ritz Manchester, organised by Liverpool Sound City and presented by the Beijing hip-hop label M_DSK, a Modern Sky subsidiary. The stars of the Chinese music reality show *The Rap of China*, including Tizzy T, Kafe Hu and OB03, gave their UK debut performance in this event.

South Korea case study

Zandari Festa

Zandari Festa is an annual international indie music festival and conference launched in 2012 by Younyoung Kong. It is held annually in autumn in the Hongdae area in the northwest of Seoul, which is known as the hub of South Korea's independent music and alternative culture scene with a number of small-to-medium-sized live music venues, studios and publishing companies. The name of this festival came from the old name Zandari (lit. small bridge) for the area where the festival is held. Its association with a bridge also gives an additional symbolic meaning to Zandari Festa, which bridges and brings together the artists, audiences, promoters and producers from both home and abroad. According to the festival organisers, Zandari Festa is, above all, a grassroots and international music event which is steered and presented in collaboration with the artists and indie organisations, unlike mainstream music festivals that take a 'top-down' approach in their programming. During the 2018 Zandari Festa, all music events were held in nine different indoor venues in the Hongdae area, including music clubs, halls and bars, all within a short walking distance of each other. Zandari Festa hosts a number of international record labels, booking agents, festival and event organisers and promoters. Their international network and partnerships continue to grow and by 2018 they included 51 organisations across the globe. Calls for domestic Korean artists and international artists are posted on their social media platforms. In collaboration with their international partners, a programme or stage for the artists from specific territories is also organised, for example, the British Stage with Liverpool Sound City (under the banner of Sound City Korea) and the French Stage in collaboration with the Institut Français Séoul in Korea.

2018 Zandari Festa and the British showcase

The collaboration between Sound City and Zandari Festa focuses on the showcase in each others' annual festival. For example, since their partnership with Liverpool Sound City formed in 2013, Zandari Festa has been coordinating an annual 'Korean Stage' at the Sound City Festival in Liverpool, usually supported by the Korean Creative Contents Agency. Dave Pichilingi considers this relationship to be friendship-based with Kong Youn-Young, CEO of Zandari Company. The British Night concert has always been popular with the local audiences and international delegates. This was the case with the 2018 Zandari Festa with the energetic lead singer Fran Doran of Red Rum Club, which recently signed with Modern Sky UK, singing their hit number 'Would You Be Rather Lonely?', with his unmistakable Scouse accent.

At the 2018 Zandari Festa in Seoul, eight British acts performed – perhaps the largest number of acts to take part in Zandari so far. They included six acts on the Sound City Korea showcase programme, supported by the Arts Council and British Council: Alice's Night Circus (female solo from Sheffield), Eyre Llew (ambient rock trio from Nottingham), False Advertising (a mixed trio of alternative rock from Manchester and Oxford), Hot Soles (soul duo from Sheffield), Love Ssega

(male singer songwriter from London) and Red Rum Club (alternative rock sextet from Liverpool) which was signed with Modern Sky UK. Two acts Karkosa (rock quintet from Birmingham) and Bone Cult (electronic duo from Nottingham) came to the festival independently. Notably in 2019, two bands from the 2018 Sound City Korea list, Red Rum Club and Eyre Llew, performed in Glastonbury (established in 1970), which is one of the most iconic and famous music festival brands in the world, along with Woodstock (1969–1999) and Coachella Valley Music and Arts Festival (established in 1999) in the United States.

Dave Pichilingi said several times that South Korea is a gateway to the Asian music markets. He also suggested that if it works in South Korea it will work anywhere in the Asian territory and breaking into China. Eyre Llew and Karkosa illustrate his point quite well. Eyre Llew had an extensive tour in Asia before their performance at Zandari Festa in early October. They gave a total of 29 performances in five countries, covering Singapore, China, Japan, Taiwan and South Korea over a period of 1.5 months between early September and late October. Some of their performances were given in various music festivals in Asia, including the Music Matters Festival (Singapore), BestieRock Festival (Taipei) and Sum Festival (Jeju Island, South Korea) in addition to Zandari Festa (Seoul). A band member, Samuel Heaton, explained to me the complex process of planning and organising their tours in Asia. This was done in collaboration with their Seoul-based English agent who has lived in South Korea for over a decade.²¹ Through his professional contacts throughout Asia, Eyre Llew was able to organise their own Asian tour. For example, Eyre Llew was introduced to their Beijing-based American promoter, who in turn arranged a tour manager and helped them to get sponsorship from drink companies in China. In fact, many music promoters in China, at least those who operate in the first tier cities, are locally based or naturalised foreigners who mediate and coordinate music events. Even with these local supports, this DIY (do-it-yourself) tour planning was challenging because of the lack of funding for their international tours, while there are funds available for DIY music projects, such as album releasing, which can be undertaken at home (Heaton, personal communication June 2019). Eyre Llew signed with a Seoul-based indie record label Beeline Records. All three band members agreed that their visit to South Korea and their performance in Zandari Festa encouraged them to tour in Asia. So as Dave Pichilingi suggested, South Korea was a testing ground and a gateway for this British band.

Another example is the Birmingham-based rock band Karkosa, an act who drew a great deal of attention at the 2018 Zandari Festa, partly due to the ardent fan activities. Their fanbase in South Korea was already well established even before their debut at Zandari Festa in October. A band member Michael Warnock's Instagram posting caught the attention of several South Korean audiences who then set up an official Korean fan club for Karkosa. Within 24 hours Karkosa's twitter account had 2500 Korean fans following them. Moreover, at their arrival at Incheon-Seoul International Airport, Karkosa was met with a celebrity welcome by their ardent fans. After their sold-out performance in the KT & Sangsang Madang Live Hall, a meet-and-greet session was held at the venue, which lasted for several hours because an overwhelming number of fans wanted to see, get autographs and take photographs with the artists. At the concert, many fans were singing along Karkosa's hit song 'Sheffield'; some of the fans also told me that they came to Zandari Festa just for Karkosa's performance and they looked forward to the post-concert meet-and-greet session. This kind of audience reception is typically associated with K-pop and their fandom. However, for these Korean fans who discovered this young British indie band, aged between 15 and 19, and their music through social media, there is no question about Karkosa's celebrity or idol-like status as they see it. Most importantly, what Korean fans expect and enjoy in terms of their own 'experience' as an audience and music user is deemed to be locally specific. Karkosa returned to Korea for

two solo concerts in February 2019 in Seoul and Busan. Like Eyre Llew above, Karkosa also signed with the Seoul-based Bees Records. They recorded their new single 'Aura' in Union Studios in Seoul and released it in May 2019 in Korea and worldwide. The band's website is bilingual, in English and Korean, to cater for both international and Korean audiences.²²

On 19 June 2019, a call for the '2019 Sound City Korea' application was posted on the Liverpool Sound City's Facebook as below.²³

Sound City will be working with Zandari Festa to host official showcases of British artists. As market leaders in championing new music, Sound City will be hand-picking 4 artists to take to the vibrant music hub of South Korea and expand their global platform. Artists must be based in England and hold some of the following attributes:

- An already established local fan base
- Established catalogue of songs/material
- National gigging/touring experience
- Professional industry infrastructure (management, agent, label, distribution)
- Discography of releases but not essential
- Commitment and drive to want to take their music to a world wide platform

As illustrated in this advertisement, Sound City is a mediator who brings British artists to a South Korean festival, which is a stepping stone for their international career development. The list of attributes seemed to be rather a tall order. Perhaps Eyre Llew and Karkosa already demonstrated that they have some of these attributes that Sound City is looking for from aspiring acts who wish to enter the Asian music markets via the gateway of South Korea.

Analysis and discussion

Economic, cultural and social values

The digitisation of music and fast growth of the digital market did not deplete the live music sector, but instead live music has gained renewed and increased importance. Music festivals attract 14 million visitors to the United Kingdom every year. People are prepared to spend more money on live music and festivals than recorded music for their enjoyment of music (i.e. cultural and intrinsic value), as well as their social participation at live music events which contributes to their sense of belonging and identity (i.e. social value).²⁴ It is important because, as Frith argues, 'music listening has become a way of laying claim to one's own physical and emotional space'. He maintains, 'live musical performance matters because it is a public celebration of musical commitment, a deeply pleasurable event at which our understanding of ourselves through music is socially recognised'. It is also 'a site in which to explore – for ourselves – how performance works' (Frith, 2007, pp. 9–10).

In the same way, the three music festivals, described above, provide personal enjoyment and social participation of live music to their audiences. But at the same time, the audience interpretations and their actions appeared to vary in the different places and contexts. For example, for the South Korean audiences that attended the UK band Karkosa's concert, their engagement with music involved both online and offline fan activities, which took place before (meeting the band at the airport), during (singing along) and after (meet-and-greet) the live music event.

A study of the Chinese audience of the Midi Music Festival in Beijing, by Li and Wood (2016), also shows what young music festival goers expect from their live music experiences: while they seek a 'spiritual escape' or personal/individual freedom to get away from the constraints of everyday life, they also want to attain a 'spiritual pursuit', namely hopes and dreams associated with an idea of a youth culture. It is also notable that some audiences consider the Midi Music Festival in Beijing, to be free from materialism and commercialisation so that this music festival fulfils the utopian dream of the purely spiritual world of the 'communist society' (Li & Wood, 2016, p. 345). While the intrinsic value of music may be universal, its association with a communist utopia may be specific to the interpretation of these Chinese audiences.

From the artists' point of view, playing live in music festivals is a reliable source of income where the copyright issues and the publishing and collection of royalties are challenging, as in China (e.g. see Montgomery, 2009; Morrow & Li, 2016). Artists in South Korea (Shin & Lee, 2013) and the United Kingdom (Anderton, 2011; Cloonan, 2011; Frith, 2007) also find themselves in a similar situation because physical music sales have been greatly diminished and the profit from digital music sales is too low. In addition, for individual musicians from South Korea and the United Kingdom, travel funds are available from their respective national public organisations, which support the export of musical talent for both economic gains and cultural influence abroad.

Ecology of live music: convergence of creativity, business and politics

The ecological approach to live music highlights the significance of place. In the transnational context of the live music business, the notion of place can be as large as a nation-state and as specific as a city or a venue. As a result of this close relationship between place and live music event, many music festivals are also associated with 'place branding' (e.g. Zandari Festa to brand the creative Hongdae area of Seoul) or 'city branding' (e.g. a symbiotic relationship between the Liverpool Sound City Festival and Liverpool as a city) and the local tourism industry. This, in turn, leads to state involvement, with various implementations of cultural policies and funding schemes, at the regional or central government level. All three music festivals under examination have received funding from their respective public organisations. In this sense, live music, place and identity are closely linked to each other, bringing the culture, economy and geography together.

At the same time, the influences of the respective public sectors are varied, reflecting the different industry-state relationships, be it 'authoritarian', 'benign' or 'promotional' (Cloonan, 1999), which in turn give shape to the ecology of the live music sector. With regard to the national cultural policy, Britain might be seen as an example of the benign nation-state, which controls live music, but generally leaves popular music to the market, indirect subsidies notwithstanding (Cloonan, 1999, p. 204). But it also takes a 'promotional' approach for the export of UK music abroad: for example, the 2018 'Music Mission to China' was supported by the Department for International Trade, in collaboration with the British Phonographic Industry and Association of Independent Music to promote the United Kingdom's music presence in China. This mission also shows how cultural policy and business policy for the United Kingdom's creative industries are inextricably linked to each other.

The cultural and creative industries in China are not just for commercial gain but are also part of their ideological project that promotes nationalist pride at home (Keane, 2006) and 'soft power' abroad (Garner, 2015; Hartig, 2016). In this sense, the cultural and creative industries are often more than just a business enterprise but are also deemed to be a 'national project' and, consequently, state support comes with various rules and regulations, with a 'top-down' approach (Morrow & Li, 2016) while providing financial subsidies and other forms of support to the industries (Groenewegen-Lau,

2014). This is an example of a state policy that combines authoritarian and promotional approaches to popular music: the authoritarian approach takes strict control of recording, a licensing system for live musicians and strict control of imports, while taking a promotional approach to music as a national asset (Cloonan, 1999, pp. 203–204). These specificities of the local business environments may be termed ‘the cultural and creative industries with Chinese characteristics’. Arguably, the Chinese government, according to O’Connor and Gu, ‘retains its control over the cultural industries as part of its cultural system’ (O’Connor & Gu, 2019, p. 189; also see Kim & Fung, 2017). In this context of the cultural system, the music business in China navigates and negotiates with adaptable entrepreneurial strategies, as shown during the Sound of the Xity showcases.

Some contrasts in business emphasis were also found in the three case studies. For example, Sound City (UK) and Zandari Festa (South Korea) proactively promote their music and musicians to each other as their talent export. Both UK and South Korean public sector and funding bodies take a similar approach to the promotion of their cultural and creative industries to provide direct support for an ‘export’ and commercialise their talents and music.²⁵ They include both government offices, such as the Department of Industry and Trade UK and the Ministry of Culture, Sports and Tourism in South Korea, and various art agencies including Arts Council England and the British Council in the United Kingdom and the Korean Creative Contents Agency (KOCCA), Korea Arts Management Service (KAMS) and Arts Council Korea (ARKO) in Korea. At the local level, private commercial sectors (e.g. drink companies and credit card companies) also sponsor music festivals. The cultural and creative industries in both the United Kingdom and South Korea are not only important economically and culturally, but also politically, as they are deemed to build and enhance a positive image of the country and its ‘soft power’ (Nye, 2005) in international contexts. To further support Korea’s export-oriented cultural and creative industries, since the 2011 government’s announcement of their global strategies (Kwon & Kim, 2013), South Korean agencies have been funding various ‘international tour’ projects of individual Korean artists – a type of funding which the UK public funders also offer. Arguably, ‘soft power’ is equally important for the Chinese cultural and creative industries. However, if China’s outbound trade is seen as ‘official’ and propagandist and their products aligned with the government’s brand image, as Keane (2016, p. 27) suggested, what is lacking in these Chinese cultural export products are entertainment and commercial values that will sell these creative products in the international markets.

In contrast, Modern Sky has not sent Chinese artists to showcase in their partner festival of Liverpool Sound City on a regular basis. In fact, Liverpool Sound City Festival has not featured many Chinese musicians, while many Taiwanese indie bands came to perform in Liverpool. This seems to indicate that the Chinese cultural and creative industries are primarily focused on their domestic consumption. Regarding the flow and contour of popular culture in Asia, Chua (2012) considered China, along with Singapore, as a site of consumption in contrast to other centres, for example, Japan and South Korea (for the Asian region and worldwide) and Hong Kong and Taiwan (for the Chinese-speaking world and its diasporas), which produce and distribute popular culture. When Keane (2004) discusses China’s national ‘creativity deficit’, he was referring to China’s creative content industries at that time. One-and-a-half decades have passed since then and the ecology of the creative industry in China has drastically changed, especially with the deep and wide penetration of digital technology throughout China. For example, Yema Live, an App for Chinese music developed in 2015, is an example of how live music streaming technology was combined with the creative output of Indie musicians who used this App as a tool and platform for interactive live performance delivered directly to their audience online (Music Business China, 2015).²⁶ It is a very small and specific yet significant example for a fast growing and creative convergence of technology and music-making in the digital ecosystem of China (see Tang & Lyon, 2016).

Transnational music business: ecological implications

The partnership between Sound City and Modern Sky is complex. Sound City, as Modern Sky's international wing, for Modern Sky UK and Modern Sky USA (both of which are headed by Dave Pichilingi), has been fulfilling multiple roles in several different music business ecosystems. For example, Modern Sky UK, with its Liverpool and London-based offices, is a provider and mediator of creative external/international networks and professional advice to Modern Sky. It also operates within the internationalisation structure of Modern Sky Entertainment while fronting the international business of Modern Sky by collaborating and competing in the Chinese local and global markets. Modern Sky USA, with its home in LA, aims to create opportunities for the Modern Sky Chinese repertoire, signed globally by the company, for sync and publishing (Stassen, 2019).²⁷

The local cultural environments, consumers and infrastructure of the music business in each territory are also very complex. Case studies presented here suggest that specific local business networks and environments are crucial for the development and success of live music. At the local level, some promoters and agents are transnational and translocal, for example, the Beijing-based American or Seoul-based British small companies which play crucial roles in the transnational live music business in the region.

In a geographically and culturally vast country like China where the cultural and creative industries, including music, are also 'regionalised' (O'Connor & Gu, 2006; Wang & de Kloet, 2016), it may be even more challenging to understand and navigate the terrain of this music market, let alone to 'break into it'. Dave Pichilingi of Liverpool Sound City predicts that in the next 5–10 years, Asia will be the most important territory within the global music market. He asserts, 'We want to make sure that we are ahead of the pack and make sure that we are ahead of the competition, while most of our competitors focus on America'. This sense of urgency seems to stem from concerns for the future of the UK economy, and the music industry in particular, in anticipation of the United Kingdom's departure from the European Union (EU). Shen Lihui of Modern Sky Entertainment, however, is more cautious: 'We must slow down in China, as we are developing so fast. We must be fast enough so that we are not left behind but slow enough to ensure the quality of our products'. At the same time, he would also like to see the internalisation of Chinese music: 'K-pop is now influential in the Chinese market, also to the youth in the US and Europe. I think the same thing would happen to Chinese music' (Panel discussion at the 2018 Gold Melody Awards conference). But to do this, they need to export it and connect with their international audience.

Finally, it is also notable how social media and digital technology influence the live music environments, to expand their transnational and translocal milieu, with some local specificities that also contribute to the creation of community. The South Korean fan engagement with British artists, initiated by Instagram, is an example of transnational fandom development, which is also common to K-pop. So far, the use of social media in the Chinese live music scene is more domestically oriented, for example, Chinese indie musicians use an App for live music streaming as a tool and platform for interactive live performance delivered directly to their audience online.

Conclusion

The case studies from the United Kingdom, China and South Korea discussed above represent three different live music environments, or ecologies, although their collaboration and partnerships bring them closer to each other. Liverpool Sound City, UK, operates in a music business environment where live music makes a significant contribution to the national economy and cultural fabric of the wider society. The company's development and their engagement with various international

projects and industry events also demonstrate how live music promoters can act as intermediaries for transnational music business partnerships. As for the Chinese case study, Modern Skye's role in the Chinese live music sector and its evolving business partnership with Liverpool Sound City reflects the trajectory of the Chinese music industry and its aspiration for future development in the international markets. The South Korean case study Zandari Festa shows how an indie music festival functions as a conduit of transnational music networks for the region while promoting home-grown talents internationally.

The ecological approach to live music highlights the importance of place, be it physical, virtual or symbolic, or be it a nation-state, city or a specific venue, in which interactions take place between various factors and actors involved. In the transnational context in which the three different music companies operate, the notion of ecology for the business of live music may require further consideration and development for the transnational and translocal dimension of the music business ecology. For example, what are the implications of convergence or what happens if two or more music ecologies intersect with each other, and what kinds of theoretical paradigm and analytical tools could be employed?


With regard to the research methodology, ethnographic and interdisciplinary research on what is deemed to be necessary to understand 'what was going on there and when'. Given the importance of live music consumers, not many live music studies give enough attention to the audiences and their reception experience at the expense of the live music producer and production. During the short period of my pilot study, I was able to observe, although briefly, how the audience engage themselves in the personal and social construction of musical meaning. It was also instructive to see how the interpretation of musical experience can be culturally and socially specific.

The recent publication of *Music Listening 2019*, by the International Federation of Phonographic Industry (2019b), reports how recorded music is enjoyed around the world. The 10 favourite genres globally include pop, rock, oldies, hip-hop/rap, dance/electronic, indie/alternative, K-pop, Metal, R&B and Classical. It is also notable that Chinese listeners have preference for imported music over home-grown music (i.e. pop, oldies and C-pop) while South Koreans prefer home-grown genres (i.e. K-pop, pop and K-trot). Very likely these audience preferences for recorded music will influence their choice for live music. These statistics offer a useful context for understanding the current global music market, which is populated by varied musical styles and genres. Similarly, the live music sector worldwide will become increasingly transnational and diversified for our future studies.

Funding

This research was supported with a Knowledge Exchange and Impact Voucher and the Research Development Initiative Fund from the University of Liverpool.

ORCID iD

Haekyung Um  <https://orcid.org/0000-0001-9114-4605>

Notes

1. The Woodstock Music Festival is documented and monumentalised in several films including the original documentary *Woodstock: 3 Days of Peace and Music* (1970), several anniversary editions for the 25th and 40th anniversaries (1994 and 2009, respectively) and *Woodstock: Three days that defined a generation* (2019).

2. See Sanchez (2018).
3. This Beverly-Hills-based American global entertainment company was formed from a merger of Live Nation and Ticketmaster in 2010. It owns, leases, operates and has booking rights for a number of US entertainment venues. Live Nation Entertainment produces 30,000 shows and over 100 festivals selling 500 million tickets per year. It also hires 44,000 employees worldwide. Also see Live Nation Entertainment website: <https://www.livenationentertainment.com>
4. AEG is a sports and live entertainment company with its headquarters in LA. It operates in North America, Europe and Asia through 16 regional offices. It produces or supports more than 25 music festivals, including the Coachella Valley Music and Arts Festival, and hosts more than 10,000 shows each year. It owns, manages or books more than 90 clubs and theatres around the world. Also see AEG website: <https://www.aegworldwide.com/divisions/music>
5. During this pilot study, a short documentary film, entitled *Three Sound Cities: Liverpool, Beijing and Seoul*, was also made and had its first screening at the 2019 Liverpool Sound City Conference in May 2019.
6. The Baltic Triangle is a section of the hinterland of Wapping and Queens Docks in Liverpool. Its name came from the many companies based in the area which had trade with the Baltic countries. Its maritime connections still survive in the Scandinavian Seaman's Church (Gustaf Adolfs Kyrka) and the Baltic Fleet pub which are listed as Grade II* and Grade II, respectively.
7. UK Trade and Investment (UKTI) was formed in May 1999 as a non-ministerial government department working with businesses based in the United Kingdom to assist their success in international markets and also with overseas investors looking to the United Kingdom as an investment destination. It was replaced by the Department of International Trade (DIT) in July 2016.
8. The Culture Diary is a free worldwide calendar of UK culture including private, media, industry and public events all uploaded by over 9000 UK organisations covering every art form. It was first launched in 2012 to manage the Olympic culture programme and was then re-launched in June 2015 as an international calendar for all UK culture organisations. Their partners include Arts Council England, British Council, Department for Culture, Media & Sport, Department for International Trade, Foreign & Commonwealth Office, Greater London Authority, GREAT Britain campaign, and VisitBritain. Website: <https://www.theculturediary.com>
9. For Modern Sky, see the next section.
10. See the event website: <https://www.ibfmusicday.com>, accessed 20 June 2019.
11. MU:CON, launched in 2012, is one of the leading music industry conventions in Asia and is hosted by the Korean Creative Content Agency (KOCCA), which is an agency under the Korean government's Ministry of Culture, Sports, and Tourism (MCST). According to the MU:CON's data, the 2017 MU:CON had 11,000 attendees, 105 invited delegates, 81 live shows, 19 co-festival agreements signed (including Glastonbury, Music City, The Great Escape from the United Kingdom, South by Southwest from the United States and Gold Melody Awards from Taiwan), and 1724 buyers held 2185 meetings. MU:CON's sponsors are Gearlounge and Dalcomsoft.
12. Personal communication with Dave Pichilingi (March 2018) and with Shen Lihui (April 2018).
13. The Midi Modern Music Festival (also known as Midi Festival), hosted by the Beijing Midi School of Music, in 1997, is attributed as the first rock music festival in China. In November 2017, the Midi Festival celebrated its 20 anniversary at the Beijing Midi School of Music.
14. Chapter 68 'Provide More Cultural Products and Services', section 3 'Modern Cultural Industries', National Development and Reform Commission (NDRC) People's Republic of China: <http://en.ndrc.gov.cn/newsrelease/201612/P020161207645765233498.pdf>
15. At the same time, it is notable that the taxonomy and concept of 'cultural industry' and 'creative industry' in China differ from those of the United Kingdom or the European Union (EU): for example, 'the national government of China attempted to separate creative from cultural industries, allocating the former to the economic agenda and the latter to the cultural (and thus under the control of the Culture ministry) (O'Connor and Gu, 2019, p. 178). In addition, the term 'creative industries' was also expanded to

include many non-cultural activities (Keane, 2007). This division of 'cultural' and 'creative' also leads to a separate departmentalisation, namely 'economic' and 'propaganda/publicity' departments, overseeing their respective businesses. However, a composite term 'the cultural-creative industries' was eventually created because of the high level of crossover and ambiguity between cultural and creative industries (Chen, 2012).

16. Xi Jinping: 'Build a socialist strong cultural power, raise national cultural soft power', http://news.xinhuanet.com/politics/2013-12/31/c_118788013.htm (Keane, 2016, p. 40).
17. It is also interesting to note that this commercial success and commercialisation of music festivals was seen as problematic by many: both conservative Communists and neo-Marxists disapproved this 'neo-liberal trend of depoliticization and co-optation' (Groenewegen-Lau, 2014, p. 3). This is associated with what de Kloet (2010, p. 26) termed 'Chinese rock mythology, a set of narratives which produce rock as a distinctive music', that is as being authentic, subcultural, masculine and rebellious.
18. An article by Yu Peiying (2019).
19. See Chen (2018).
20. Also see an article in *The Beijinger*, which covers the cancellation of the events during the 2018 Sound of the Xity. Will Griffith (2018).
21. Patrick Connor, who is the founder of an Indie live music promotion company Highjinx and a Korean indie music webzine *DOINDIE* and a co-founder of an Indie label Beeline Records.
22. Karkosa's website: http://www.karkosa.co.uk/?fbclid=IwAR2HHTDi41mJgoqKKq_v5WcKFBzju_YgruVnUEjc5DMUmqq-83TWh-b7qrs
23. Call for 2019 Sound City Korea: https://www.gigmit.com/liverpool-sound-city?fbclid=IwAR2hPF3Lg8czsm4jHz6ZPZWvAgw_QZ4uAmo6HHPDUzzOck36PK7Ac-Rj0_A
24. For example, Glastonbury, the United Kingdom's largest open-air music festival attracts 120,000 people who pay up to £85 per day for their tickets alone. The 2018 Liverpool Sound City Festival ticket price for the whole period (3–5 May) was £55 and a day pass was £31.50. Sound of the Xity had a separate ticketing arrangement with each venue: for example, the double bill concert by two UK bands, Yuck and Slow Reader Club, at Live Tango on 13 April, cost 200 yuan (approx. £23) at the door and 150 yuan (approx. £17) by reservation. The 2018 Zandari Festa ticket price was ₩70,000 (approx. £47) for the whole festival and ₩30,000 for a day pass.
25. It is also notable that in a publication of the Korean 2017 Culture and Arts Policy White Paper, the Minister said in the preface that the government will support but not interfere with the development of culture and arts in Korea (Korean Ministry of Culture, Sports and Tourism, 2018, p. 3).
26. See Music Business China (2015).
27. See Music Business Worldwide (2019).

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Author biography

Haekyung Um is a Senior Lecturer in the Department of Music and the Institute of Popular Music at the University of Liverpool. She specialises in contemporary Asian performing arts and music industries focusing on identity, policy and transnationalism. She has published on the Korean musical drama *pansori*, Korean diasporas in China and the former USSR, Indian classical music in the UK, Korean hip-hop and various aspects of Korean vocal genres. Her current research includes: South Korean music reality shows and their canonic interpretations of the Korean popular music repertoire; K-pop fandom in the UK; and live music collaborations between the UK, China and South Korea.